

# CLICKDIMENSIONS PARTNER TRAINING

Considerations for Email  
Template Design



# TODAY'S AGENDA

- Email Editor Differences
- Approaches to generating templates
- Design Considerations
- Deliverability Considerations



# WHAT IS AN EMAIL TEMPLATE?

From a ClickDimensions perspective, an Email Template is a record that contains the content of an email that will be sent out to your recipients.

- This can be the basic skeletal structure
- This can be the record with all of the content added into it



Praesent laoreet malesuada cursus.

Maecenas sed ante pellentesque, posuere leo id, eleifend dolor. Class aptent taciti sociosqu ad litora torquent per conubia nostra, per inceptos himenaeos. Praesent laoreet malesuada cursus. Maecenas scelerisque congue eros eu posuere. Praesent in felis ut velit pretium lobortis rhoncus ut erat.

A Button



## CLICKDIMENSIONS NEW RELEASE

It's time again for another ClickDimensions release!

Highlights for the ClickDimensions 8.5 release include new campaign automation [form capture](#), [event registered](#) and [event attended](#)



# AVAILABLE EMAIL TEMPLATE EDITORS

- Drag and Drop
- Free Style
- Block
- Custom HTML

EMAIL TEMPLATE : INFORMATION

## New Email Template

### ◀ General

Name \* **June Newsletter**  
Subject \* **ClickDimensions June Newsletter**  
Preheader **--**

Editor Type \*  
Block Editor  
Free Style  
Custom HTML  
**Drag and Drop**



# CREATING A TEMPLATE: START FROM SCRATCH

Create a new template using the tools provided out-of-the-box

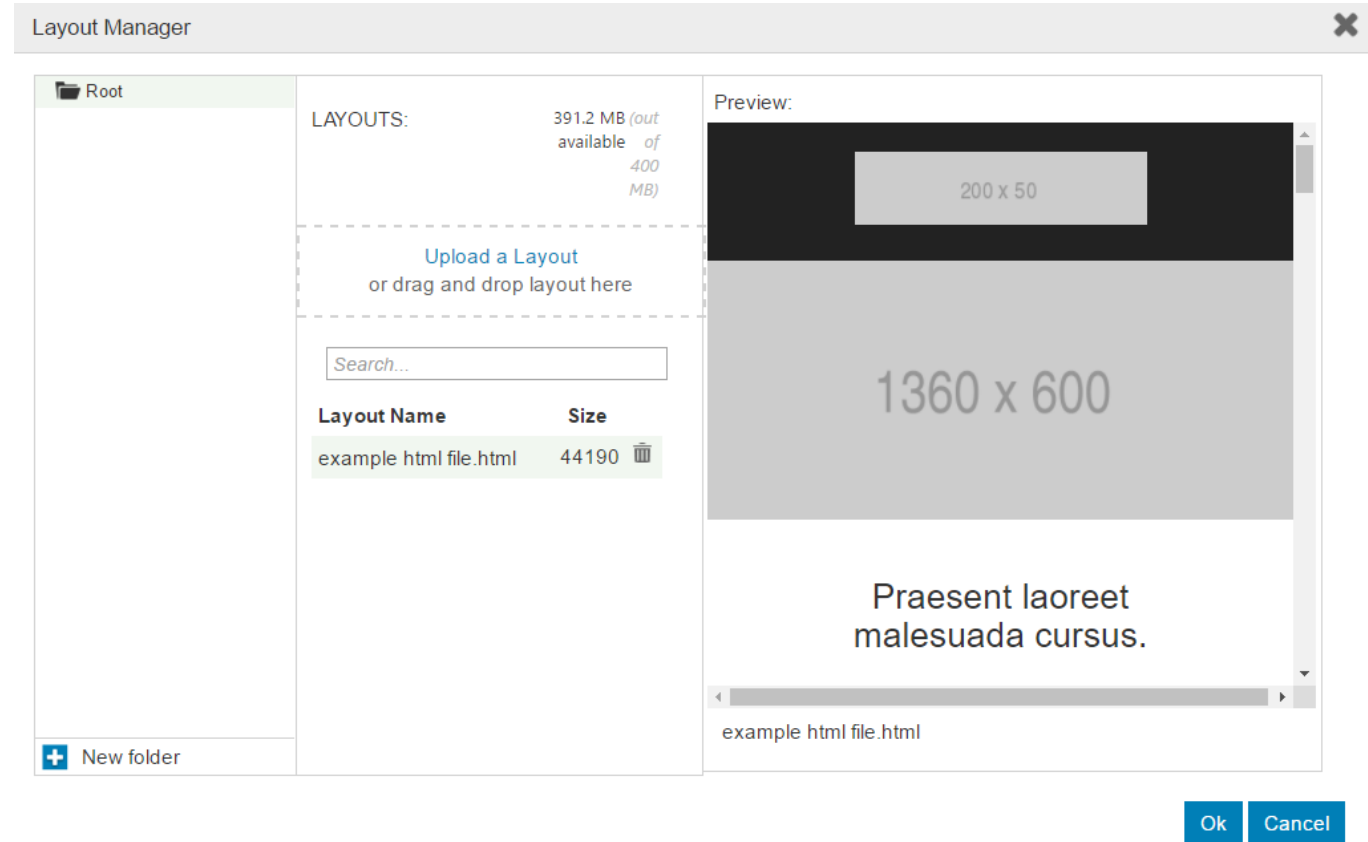
- Available in: Drag and Drop, Free Style, Block, Custom HTML
- Pros: No preexisting design restrictions, freedom
- Cons: Larger time investment, more opportunities to make mistakes



# CREATING A TEMPLATE: LAYOUT MANAGER

Upload a preexisting layout to use as a basis for the template

- Available in: Freestyle, Block\*
- Pros: Save time, consistency
- Cons: overuse of a layout could bore recipients



The screenshot shows the 'Layout Manager' interface. On the left is a file tree with 'Root' and a '+ New folder' button. The main area is divided into sections: 'LAYOUTS:' with a status '391.2 MB (out of 400 MB)', an 'Upload a Layout' button, a search bar, and a table of existing layouts. The table has columns for 'Layout Name' and 'Size', with one entry: 'example.html file.html' (44190 bytes). A 'Preview' window on the right shows a layout with a 200x50 header and a 1360x600 main body containing the text 'Praesent laoreet malesuada cursus.' Below the preview is a scroll bar and the filename 'example.html file.html'. At the bottom right are 'Ok' and 'Cancel' buttons.

Layout Name	Size
example.html file.html	44190

# TEMPLATE DESIGN CONSIDERATIONS - LAYOUT

Many email recipients now open emails on mobile devices. Effective email design now calls for simplicity in order to ensure a consistent email experience across different devices.

- To accommodate mobile opens, a 1 column layout or a responsive template is recommended
  - Drag and Drop editor is responsive out of the box
  - Starting with a 1 column layout rather than relying on a responsive template may yield more consistent results from device to device
- Max width: 600 pixels
  - Drag and Drop and Block Editors have a set 600px width



# TEMPLATE DESIGN CONSIDERATIONS – TEXT AND LINKS

How text is presented visually can have a big impact on its legibility and the recipient's impression of your tone and professionalism

- Use four or less font types and colors
- Make font large enough to be easily legible.
  - 13-14px for body text, 20+px for titles.



Text hyperlinks are fine on a desktop, but may be too small to easily click on a mobile device.

- Use buttons instead of hyperlinks for ease of use on mobile devices and visual draw
  - 40 x 40px minimum size to ensure they are easily clickable on mobile devices



# TEMPLATE DESIGN CONSIDERATIONS - CONTENT

Layout and aesthetics are important to make sure your email looks professional and is legible, but for the email to be effective, content is king.

- Call to Action (CTA) should be clearly visible and placed above the fold
  - Placing the CTA below the fold will result in a sizeable decline in interactions
- Use images responsibly. Including too many can make the email cluttered
- Include an email signature with contact info to encourage interaction with customers
- Add Social Sharing links to let customers market for you!
- Add Social Links to allow customers to engage with your through different channels



# TEMPLATE DESIGN CONSIDERATIONS - GIFS

GIFs are a popular image format online that can be useful in an email if used responsibly.

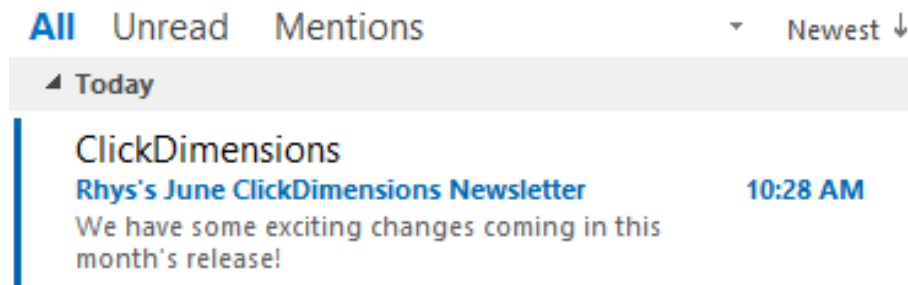
- GIFs can convey more information than a static image within the same space
- The movement in a GIF can draw attention to a Call to Action
- The novelty of a well used GIF can make your email more memorable and drive interactions
  - An A/B test conducted by BlueFly found that emails featuring an animated GIF generated 12% more revenue than the same email using a non-animated image



# TEMPLATE DESIGN CONSIDERATIONS - SENDING

Recipients are more likely to interact with emails that seem to be catered to them and are sent from somebody they recognize.

- Use easily identifiable From Name and Email values
  - From name = your brand name, From address = an identifiable email address
- Use dynamic content to personalize your subject lines
- Include preheader text that expands upon the subject or serves as a call to action



# TEMPLATE CONSIDERATIONS: AVOIDING SPAM FILTERS

## Practice permission-based email marketing

- Make sure you are talking to the right audience and that they actually want to receive your email.

## Ask your audience to add you to their “Safe Senders” list

- Ask recipients to add you to their whitelist or safe senders list to ensure that future emails don't get filtered out.

## Send timely, relevant content

- When writing your marketing communications, avoid gimmicky language (words and phrases like “discount”, “act now”, or “special offer” are dead giveaways!). Instead, be informative and add value.

## Stay in touch

- Once you've gained someone's permission to communicate with them, keep the channels open – don't blast them with a dozen emails on day one and then send them nothing for six months. Keep your communication levels consistent.



# TEMPLATE CONSIDERATIONS: AVOIDING SPAM FILTERS

## Provide a way to opt-out

- ClickDimensions enables marketers to include unsubscribe links or subscription preference links in their emails. Always include these in your emails.

## Use the Test button before sending to see how your email rates

- ClickDimensions performs some checks via the “Test” button on an Email Send. These tests will give you a good idea of how your email might be perceived by spam filters.

## Create an SPF record

- SPF records are a way to tell ISPs that ClickDimensions is authorized to send email for you. Gmail and many other mail services and spam filters will check a domain’s SPF record as one of the many factors used in judging if an email is spam or not.



# RECAP

- Email Editor Differences
- Approaches to generating templates
- Design Considerations
- Deliverability Considerations





# QUESTIONS?

